



INSURANCE  
AGENTS & BROKERS  
SERVICE GROUP INC.

# IA&B AGENT'S UMBRELLA QUESTIONNAIRE

**Important Notes:** This Umbrella Questionnaire is not a full Umbrella application and is for information purposes only. Please provide most current and accurate information as possible. A full Umbrella application must be completed and underwritten if coverage is desired.

## UMBRELLA CONTACT INFORMATION

Contact Person: \_\_\_\_\_  
 Agency: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City, State, Zip: \_\_\_\_\_  
 Phone: \_\_\_\_\_  
 Fax: \_\_\_\_\_  
 Email: \_\_\_\_\_

## AGENCY PROFILE

- Number of Total Staff: \_\_\_\_\_
- Total Premium Volume: \$ \_\_\_\_\_
- Do you currently have an umbrella policy for the agency?  Yes  No  
 Limit: \$ \_\_\_\_\_ Carrier: \_\_\_\_\_ Premium: \$ \_\_\_\_\_ X-Date: \_\_\_\_\_
- Commercial Umbrella Limit of Liability Desired: (Limits available up to \$25 million for commercial coverage)  
 1 million  2 million  3 million  4 million  5 million  Other: \_\_\_\_\_
- Underlying Coverages and Premium Information:
 

<b>Agents E&amp;O:</b>	Limit:	\$ _____
	Carrier:	_____
	Premium:	\$ _____
	X-Date	_____
<b>General Liability:</b>	Limit:	\$ _____
	Premium:	\$ _____
	Is underlying coverage a Business Owners Policy? <input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>Commercial Automobile:</b>	Limit:	\$ _____
	Liability Premium:	\$ _____ # of Vehicles: _____
<b>Watercraft:</b>	Limit:	\$ _____
	Premium:	\$ _____
- Percentage of agency business that is brokered? \_\_\_\_\_%
- Specialty Lines Information: (Complete if applicable)  
 Aviation  MGA  Bonds  Professional Liability  Long Haul Trucking

Please fax completed form to (717) 795-8347 or call (800) 998-9644 or (717) 795-9100 for additional information.

Affiliated with



**Insurance Agents & Brokers Service Group Inc.**

5050 Ritter Road • PO Box 2023 • Mechanicsburg, PA 17055-0763

Phone: (800) 998-9644 or (717) 795-9100 • Fax: (717) 795-8347

E-mail: iab@iabgroup.com • Web site: www.iabgroup.com

